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TO: Tom Lauinger and Sonya Rush DATE: December 21, 1995

FROM: Sales Program Evaluation/Jon Turner

CC: E. Gee, C. Levy & R. Whalen

SUBJECT: **Virginia Slims Fall Splash**

Executive Summary

The impact of the promotion was negligible on the national level due to low penetration, however when a promotion was running in a store, share lifts of 0.4% in C-stores and 0.8% in Supermarkets were observed.

Promotion Objectives

To penetrate 70% of all Retail Master Accounts and 40% of all Non-Retail Master accounts in the selected markets and trade classes.

Nielsen

The penetration of the promotion did not reach objectives in both C-stores and Supermarkets. Although the penetration of the promotion was skewed towards Retail Master's, penetration levels there were still below objective.

Penetration in select markets

	Convenience Stores	Supermarkets
Retail Masters	28%	37%
Non Masters	11%	9%
Total	23%	23%

The share lift in stores running the promotion was higher in Supermarkets than C-stores, and the promotion remained in supermarkets longer, giving Slims a larger lift in supermarkets over the promotion period. The impact nationally was negligible in C-stores and less than 0.1% in Supermarkets due, in part, to the low penetration of the program.

Share lift

	Convenience Stores	Supermarkets
When present in stores	0.41%	0.80%
Average promotion duration	2.0 weeks	3.4 weeks
6 week average in stores running promotion	0.16%	0.46%
6 week average Total U.S.	0.01%	0.07%

Among the competitive set, the only brands with any significant share changes during the promotion weeks, were Marlboro 100's in both C-stores (down -0.04%) and Supermarkets (-0.09%), and Capri in C-stores (-0.04%).

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Source: https://www.industrydocuments.ucsf.edu/docs/njwn0004

SPACE

Penetration of the promotion is captured in two places in SPACE, through Madden POS shipments (which is a utilization measure) and by the promo placement screen (which may miss chain accounts). Data showing the union and the intersection of these data sets is provided to give estimates of the high and low levels of promotional penetration. According to SPACE data, the promotion was placed or paid for in 53.3% of the selected Retail Master accounts, and 22.7% of the selected Non-Master accounts. Over 20% of the placements were in non-selected stores. Both the POS and the payment were in 20.2% of the selected Retail Master accounts and 5.3% of selected Non-Master accounts.

Penetration of Fall Splash*

	Retail Masters	Non Masters	Total
POS and SFA payment			
Select Markets - C-stores	22.4%	6.4%	15.8%
Select Markets - Supermarkets	11.3%	3.0%	6.4%
Select Markets and Trade Classes	20.2%	5.3%	13.5%
All other markets and Trade Classes	6.5%	2.2%	4.6%
POS or SFA Payment			
Select Markets - C-stores	56.8%	24.3%	43.5%
Select Markets - Supermarkets	49.7%	13.8%	28.7%
Select Markets and Trade Classes	53.3%	22.7%	39.6%
All other markets and Trade Classes	16.3%	8.9%	13.0%

*Account either received Fall Splash POS or made a payment through SFA for the program

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